

NHSBT Specialist Services Electronic Reporting System (SP-ICE) User Guide



Blood and Transplant

Specialist Services Electronic Reporting System (Sp-ICE)

User Guide for Sp-ICE

NHSBT Specialist Services Electronic Reporting System (SP-ICE) User Guide

The **S**pecialist Services Electronic Reporting System, delivered via Sunquest **ICE** (Sp-ICE) is managed by NHSBT to provide its customers with timely and appropriate access to patient diagnostic reports.

If you have any queries regarding use of Sp-ICE in your hospital, please contact your local hospital administrator. Any feedback on this user guide can be sent to ICE@nhsbt.nhs.uk. Your comments will be collated and used to help improve future versions.

Updates to text in this version of the User Guide are highlighted in grey.

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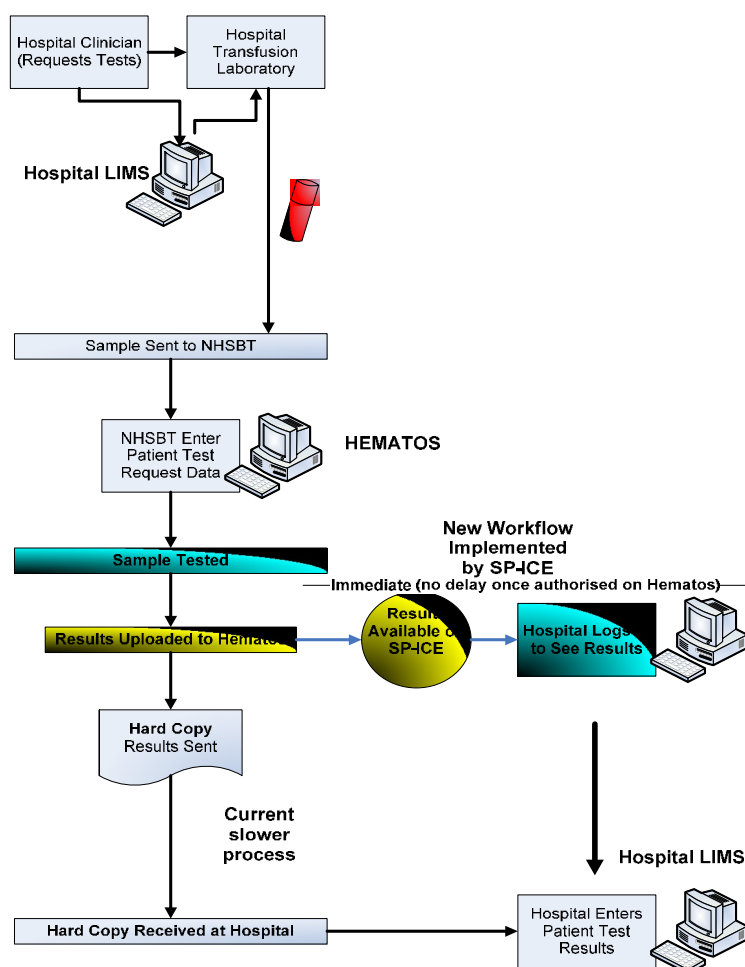
1. Introduction

1.1 Principle

NHSBT currently supplies diagnostic services to approximately 300 hospitals and to general practitioners in the primary care sector. Paper based reporting is no longer the system of choice and Sp-ICE provides an electronic solution to improve test turnaround times, remove the need to re-key data and reduce transcription error. Electronic reporting is recognised by NHSBT as an important patient safety initiative.

ICE is a Sunquest web based application enabling NHSBT Specialist Services to rapidly disseminate the results of diagnostic testing from its core IT system (Hematos) to NHSBT customers via approved file transfer protocols. Users are able to securely view and print diagnostic test results shortly after they are authorised for release on Hematos. The system will be referred to as Sp-ICE – **S**pecialist Services **ICE**. A subset of results for RCI requests will be displayed within the Sp-ICE browser with a link to the PDF report. For H&I results there will be a link to the PDF report.

1.2 A schematic of system architecture



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1.3 Responsibilities

Healthcare Caldicott Guardian/Senior Information Risk Owner (via the Primary Contact) is responsible for:

- Ensuring that prospective users are authorised to view confidential patient data.
- Ensuring that training is provided in the use of the system.
- Requesting system access.
- Reporting to NHSBT all potential adverse events including system security breaches and performance issues highlighted by staff.

Healthcare users are responsible for:

- The correct use of the system.
- Maintaining the security of patient data.
- Reporting to their Primary Contact all potential adverse events including system security breaches and performance issues.

NHSBT will train Caldicott Guardians/Senior Information Risk Owner (SIRO)/Primary Contacts in the use of Sp-ICE and then approve their access.

2 System management

See Appendix 2

3 Access control/requests

3.1 Requests for local hospital administrator accounts

Access to Sp-ICE must be through the Trust or hospital's Caldicott Guardian /SIRO/Primary Contact who must complete the declaration in [FRM4116](#) and send a signed copy to NHSBT by post to the following address:

Barbara Kiely,
RCI Laboratory,
NHS Blood and Transplant,
North Bristol Park,
Filton,
Bristol
BS34 7QH

Or scan and email to ICE@nhsbt.nhs.uk

The Caldicott Guardian/SIRO/Primary Contact will:

- Identify local administrators within their Trust or hospital.
- Request training for additional local administrators from NHSBT using [FRM4117](#).

NHSBT will train local administrators set up their account(s) and e-mail details directly to the local administrator.

Local Administrators will:

- Identify Hospital/Trust users.
- Provide training for Hospital/Trust users.
- Create accounts for Hospital/Trust users.

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3.2 Administrator/User password

When a new administrator/user logs onto Sp-ICE on the first occasion using their agreed username they will obtain their password by selecting the "Forgotten Password" option. A computer generated email will be sent to the email address supplied when the user account was created. Using the emailed password the administrator/user will be prompted to change their password before accessing records. The password chosen must be alphanumeric and consist of at least 8 characters.

The system allows five attempts at a password before locking the account. To avoid being locked out of your account use the "Forgotten Password" option before you exhaust the five attempts.

3.3 Locked accounts

Users contact your local administrators to unlock locked accounts once the account is unlocked use the "Forgotten Password" option.

If a local administrator is locked out contact NHSBT service.desk@nhsbt.nhs.uk who will reset the account and advise the use of the "Forgotten Password" option.

3.4 Inactivate a user

When a local hospital administrator leaves the service, the Caldicott Guardian/SIRO/Primary Contact must contact NHSBT ICE@nhsbt.nhs.uk using [FRM4117](#) whereupon their account will be inactivated. The account may be reactivated by submitting a new access request as in 3.1.

Local hospital administrators will be responsible for inactivating and reactivating their own users.

4. Use of Sp-ICE

4.1 Accessing Sp-ICE

- Open the application by double clicking the ICE Desktop icon.



Or use the following link to the web browser:

<https://edilive.nhsbt.nhs.uk/icedesktop/>

- The ICE Desktop Login window is now displayed
- Click on the image in the middle of the screen or the **Login** icon.



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- The ICE Desktop Login window is displayed.
- Any announcements will be displayed beneath the **Username** and **Password** box.

First Login/Forgotten Password Login:

Enter your **Username** (not case dependent).

Select **Forgotten Password**.

Open e-mail generated from Forgotten Password.

Copy password from email.

Paste **Password**.

Click **Login** or press enter.

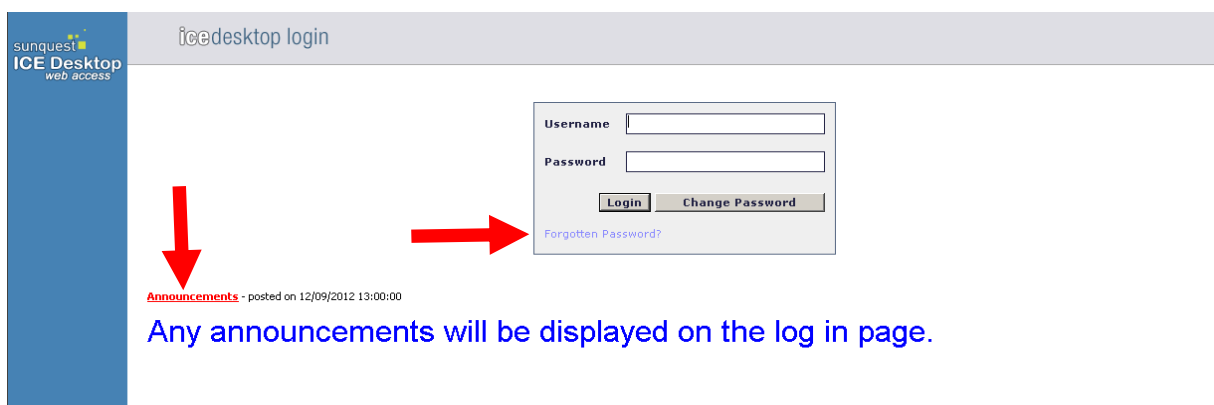
Change Password as prompted (must be alphanumeric and at least 8 characters).

Subsequent Logins:

Enter your **Username** (not case dependent).

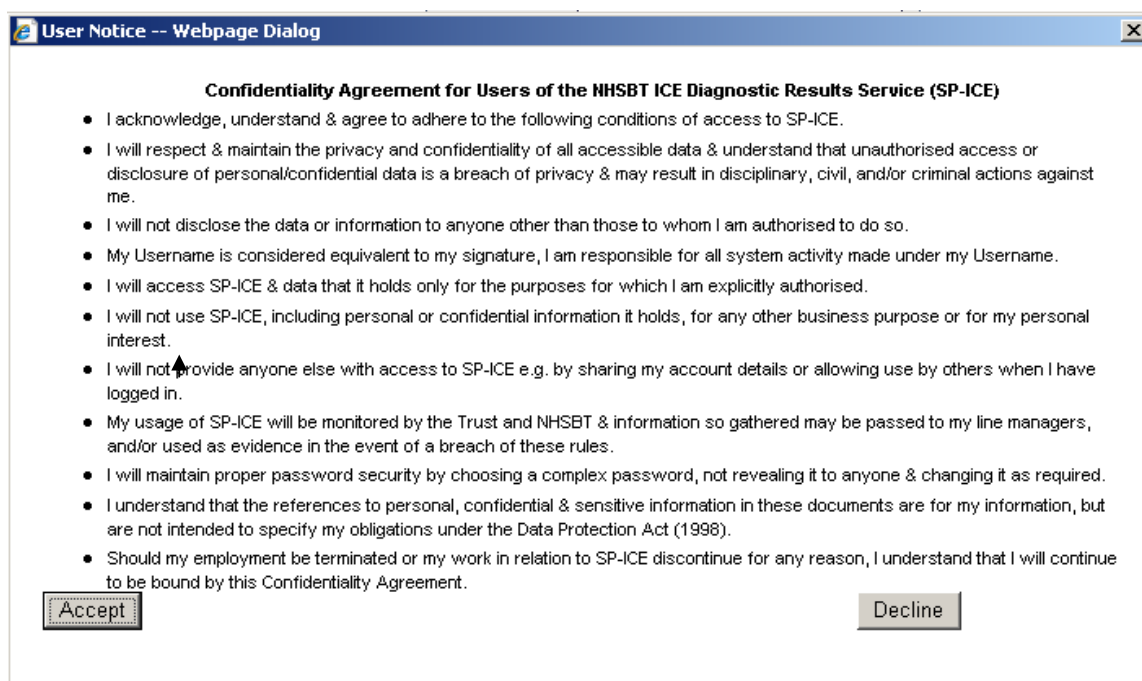
Enter your **Password** (not case dependent).

Click **Login** or press enter.



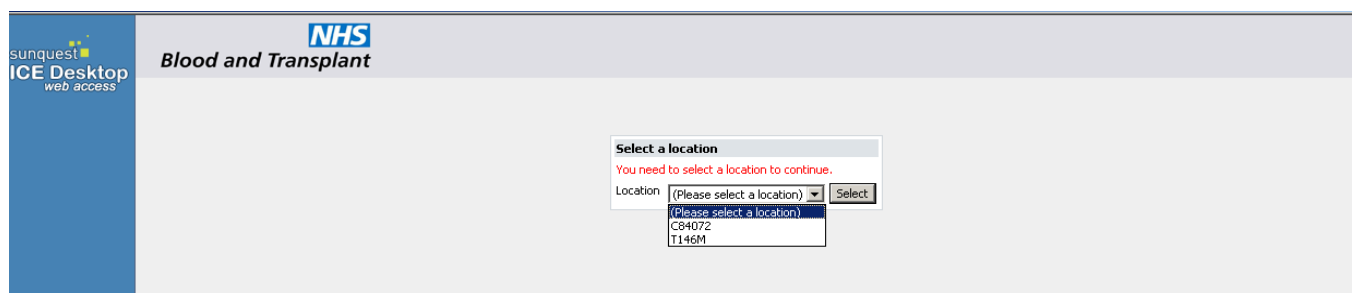
The NHSBT confidentiality agreement is displayed

- Select **Accept** to continue, **Decline** to reject (if you select **Decline** the login screen will be displayed).



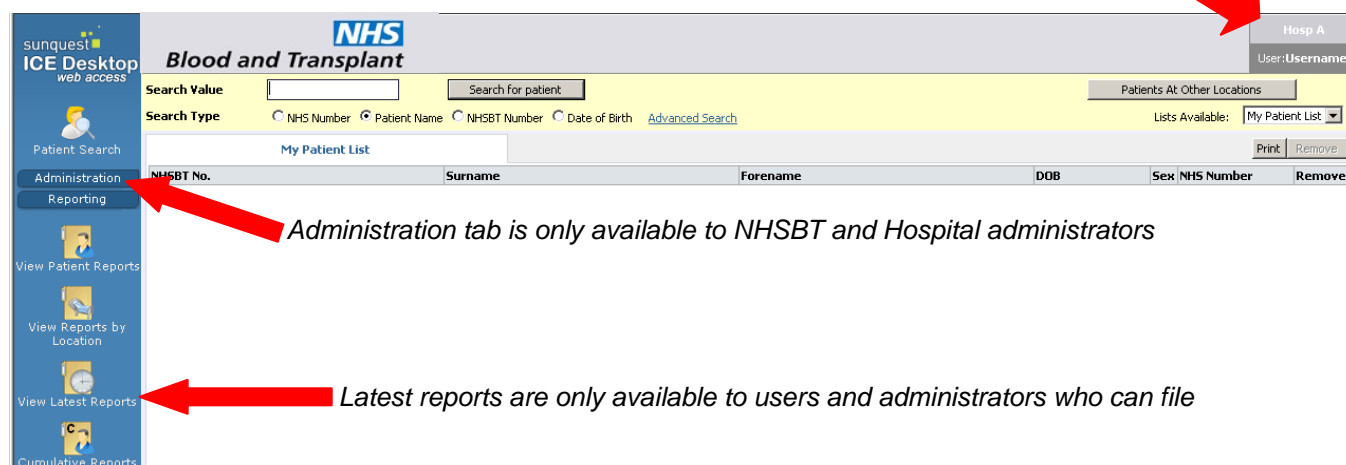
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- If you have access to more than one location/hospital select a location to continue.



- The ICE Desktop Search window is now displayed.

Displays which hospital the user has logged into and their username



Administration tab is only available to NHSBT and Hospital administrators

Latest reports are only available to users and administrators who can file

This window can be used to:-

- Search for a patient record** – using “Patient Search”
- View Patient Reports** – view reports for the selected patient.
- View Reports by Location** – displays the reports for a selected location for unfilled and filled reports.
- Latest Reports by Location** – displays the latest unfilled reports for a selected location.
- View Cumulative reports** – displays all the previous anti-D/c quantification results or titration results.

Please note the “Patients At Other Locations” button serves no useful purpose and produces an error message when selected.

4.2 Viewing and printing patient reports

Search for a patient using NHS Number, Name (just “surname” or “surname, forename”), NHSBT number or Date of Birth (dd/mm/yyyy). The radio button moves depending on the value entered into the field. You can search by hospital number using the following format hospital number-Location Code (the location code is the Hematos/NACS Code). The hospital number/s is linked to the NHSBT number and can be viewed in the “See Case Note Numbers” see over.

- Enter search criteria in the **Search Value** field

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- Select the **Search for a patient** button. If patient is found they will be displayed, if more than one patient is found using the search criteria they will be displayed in a list. **If patient records have been merged in Hematos the patient may have more than one NHSBT number.**

- An advanced search is available which enables you to enter multiple search parameters.

| NHSBT No. | Surname | Forename | DOB | Sex | NHS Number | List |
|-----------|---------|----------|-----|-----|------------|--------------------------|
| | SMITH | | | | | <input type="checkbox"/> |
| | SMITH | | | | | <input type="checkbox"/> |
| | Smith | | | | | <input type="checkbox"/> |
| | Smith | | | | | <input type="checkbox"/> |

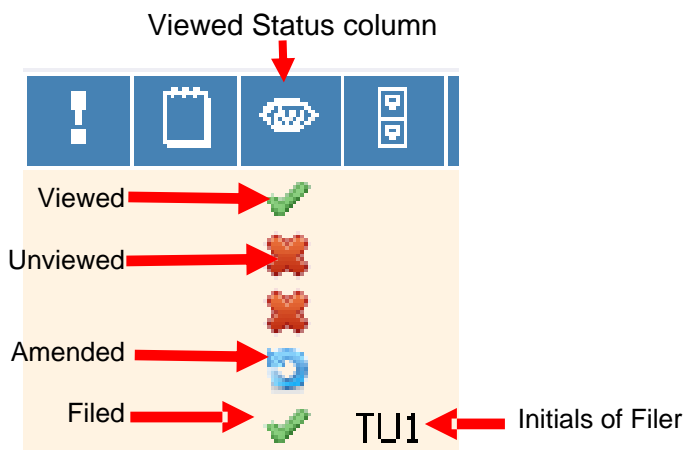
NB patient identifiable data has been removed from this screenshot for confidentiality reasons

- Select the patient from the resulting list by highlighting the correct record. The selected patient demographics are displayed at the top of the window.

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- Once the correct patient has been selected click on the **View Patient Reports** icon. The patient reports are now displayed in most recent report date order.

- It is possible to see if a report has been viewed, filed or amended in the “Viewed Status” column see screenshot below –



- If there is more than one page of reports use the **Earlier reports** and **Later reports** buttons respectively. **You will only be able to view reports for locations (hospitals) that you have been granted access to.**
- To view an individual report highlight it by clicking the left mouse button. The patient's report is displayed.
- To navigate between earlier and later reports when viewing an individual patient report click on the “Previous report in list” and “Next report in list” arrows (these arrows are greyed out when there is only one report).

Please note: A subset of results for RCI requests will be displayed within the Sp-ICE browser with a link to the PDF report. For H&I results there will be a link to the PDF

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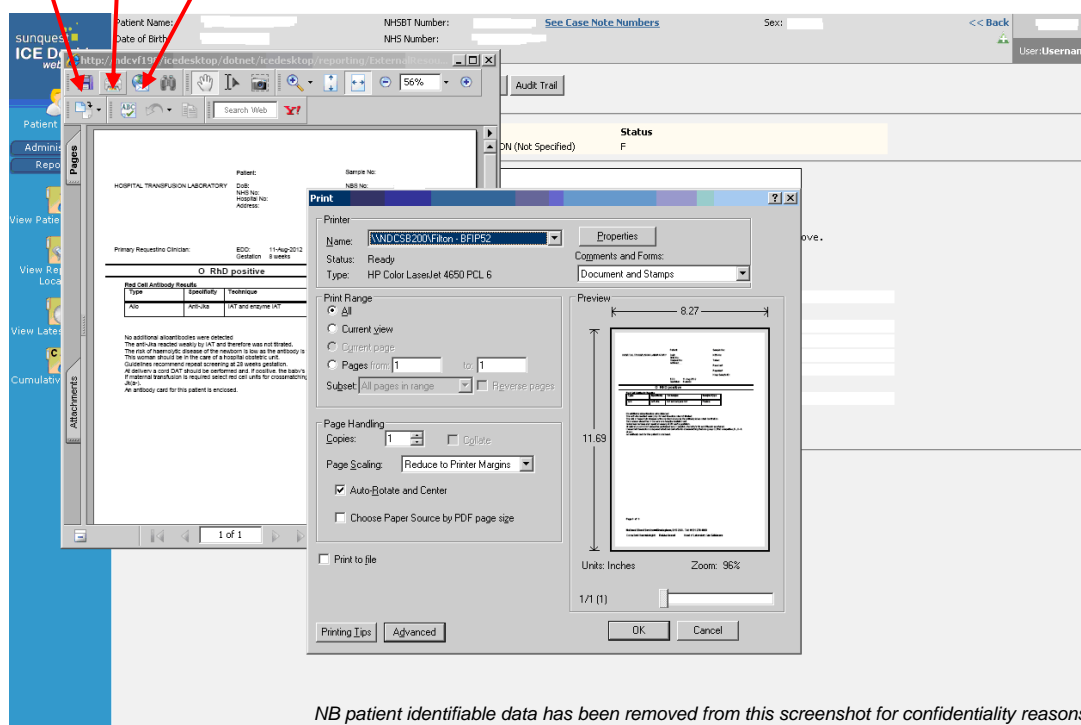
report. If no sample collected date is provided the PDF report will state “No date given” however the dataset will report the ‘Collected’ date as the ‘Received’ date.



- To print the full report you must access the PDF – see below. Please do not print the limited data set on the web browser particularly as the number displayed above the barcode in the top left hand corner of the print out, labelled as the Hospital Number is the NHSBT number, (this will be amended in a later version).
- To access the PDF reports click on the hyperlink(s). The PDF link currently displays the date the report was sent to Sp-ICE this will be amended in later versions to display the date reported.
- The PDF is displayed in Adobe viewer where you can do the following:
 - Save the PDF report to a local drive.
 - Print the PDF report to a local printer (see below).
 - Email a link to the PDF report to another person.
- It is possible to copy and paste the PDF report.

Please ensure you comply with NHS data security guidelines when sharing patient information.

Save. Print. Email. (The position and appearance of these icons will vary dependent on the version of Adobe in use)



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Cumulative Reports

Cumulative reports are available for titration or quantification results. It is possible to see all the previous anti-D/c quantification results or titration results for a pregnancy (providing you have access to the appropriate locations). It is possible to produce graphs showing the cumulative results.

- Select the “Cumulative Reports” icon from the left hand tool bar or the Cumulative button in the individual report

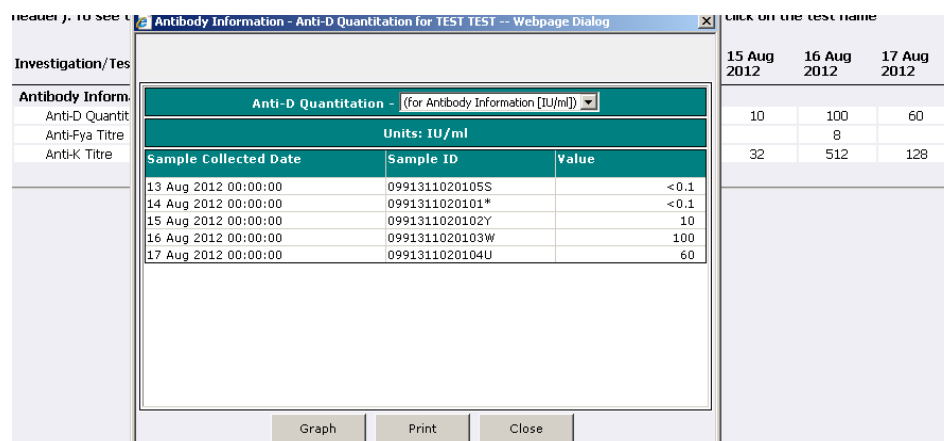
The screenshot shows the NHSBT SP-ICE web interface. At the top, patient information is displayed: Patient Name: TEST TEST, Date of Birth: 24 January 1985, NHSBT Number: 5532230556, NHS Number: No NHS Number, Sex: Female. Below this is a navigation bar with buttons: File, File & Next, Back, Cumulative (highlighted with a red arrow), Print, and Audit Trail. The main content area shows a table with columns: Reported (22 Aug 2012 12:21), Specialty (RCI), Location (T146M), Clinician (KIELY, BARBARA (Not Specified)), and Status (F). Below the table, there is a section for 'Additional information is available for this report' with a link to 'RCI Report (22 Aug 2012 13:06)'. A note states: 'A limited data set is displayed below. For full test results you must open the PDF report by clicking the link above.' The sample information is: Sample 0991311020112U (Patient) Collected 22 Aug 2012 00:00 Received 22 Aug 2012 12:14. The results are shown in a table with columns: ABO/Rhd group, RCI Report, and RCI Report. The results are: ABO/Rhd group (ABO/Rhd negative), RCI Report (RCI Report), and RCI Report (RCI Report). A note at the bottom states: 'You must open the PDF report for full results.' The left-hand toolbar has icons for Patient Search, Reporting, View Patient Reports, View Reports by Location, View Latest Reports, and Cumulative Reports (highlighted with a red arrow).

- The cumulative view is displayed. The **Back** button, takes the view back to the individual report view. The **Print** button is used to print out the results cumulatively (the number displayed above the barcode in the top left hand corner of the print out is labelled as the Hospital Number but is actually the NHSBT number, this will be amended in a later version). The “Next” and “Previous” arrow buttons enable the user to view earlier or later results – it is possible to view a maximum of six results with the latest result on the far right of the screen. Please note the highlighted result on the left is the oldest result on view.
- To view, save or print a graph select the individual antibody information (Quantification or Titre).

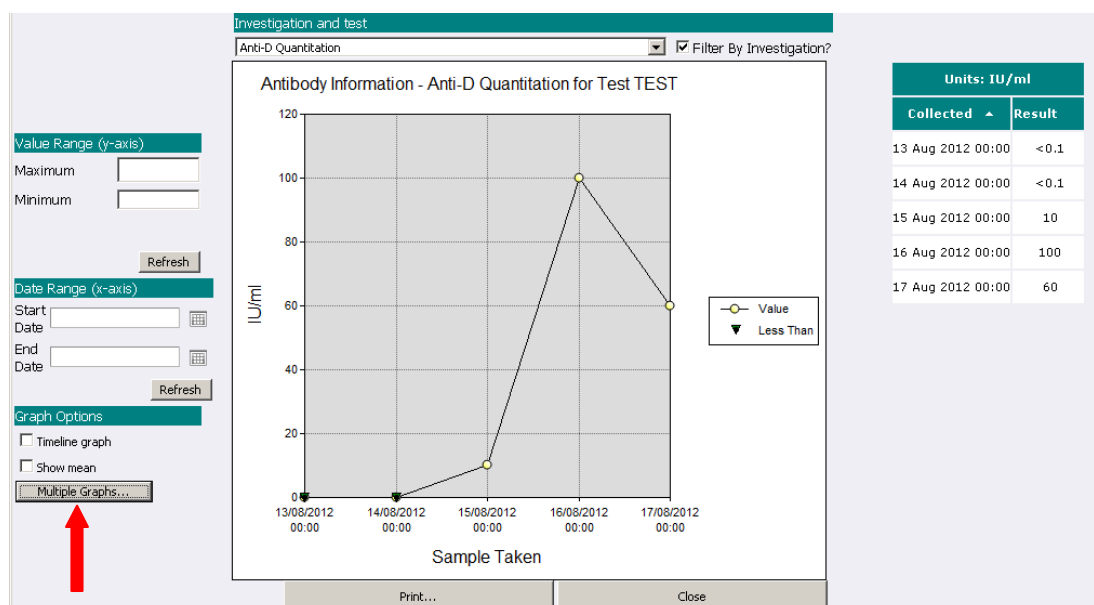
The screenshot shows the NHSBT SP-ICE web interface. At the top, patient information is displayed: Patient Name: TEST TEST, Date of Birth: 24 January 1985, NHSBT Number: 5532230556, NHS Number: No NHS Number, Sex: Female. Below this is a navigation bar with buttons: Date, Match up test results across investigations, Cumulative, Print, Profile, and Tests Only View. The main content area shows a table with columns: Investigation/Test, Range, Units, Sample Taken (13 Aug 2012, 14 Aug 2012, 15 Aug 2012, 16 Aug 2012, 17 Aug 2012). The results are shown in a table with columns: Investigation/Test, Range, Units, and Sample Taken. The results are: Anti-D Quantitation (IU/ml, <0.1, <0.1, 10, 100, 60), Anti-Fya Titre (8), and Anti-K Titre (2, 4, 32, 512, 128). A red arrow points to the 'Antibody Information' section in the table.

- The results will appear in tabular form, select graph.

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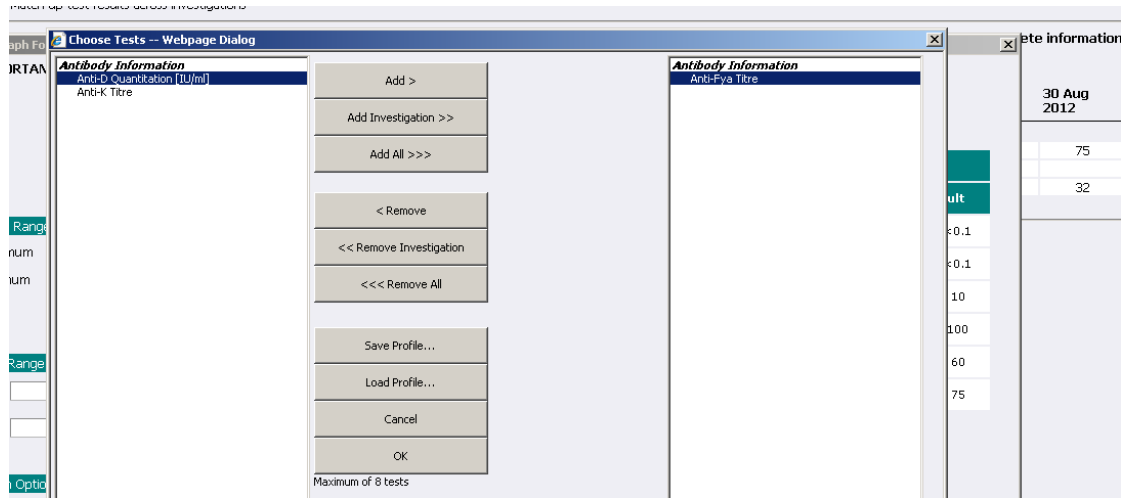


- The individual graph appears. Please note if you select a date range the graph will “hang” (this will be fixed in a later version) please close and re-select graph. To set a date range for a graph use the multiple graph option described below.
- Graphs can be printed using the print button. **Please note the number displayed under the patient name on the printout is labelled as the Hospital number but is actually the NHSBT number, this will be amended in a later version.**
- You can select “Multiple Graphs”

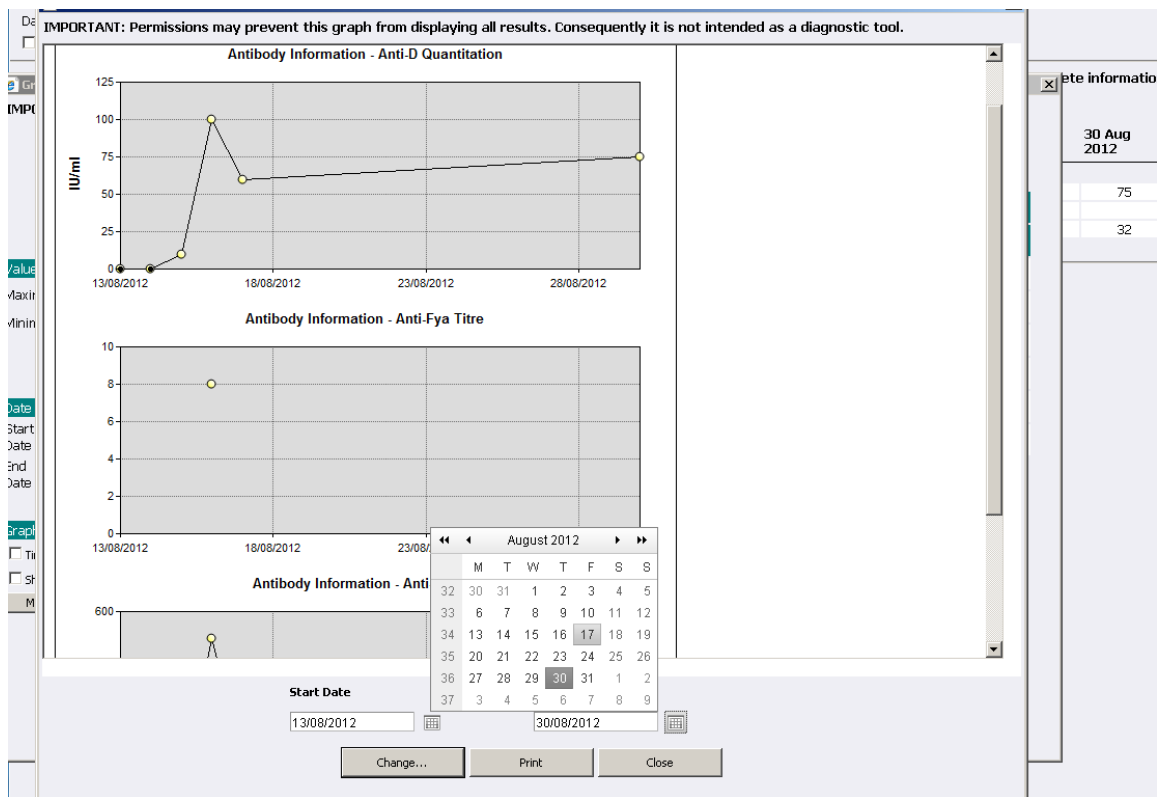


- From the multiple graphs view you can select individual tests using “Add” or all tests using “Add All”
- Click “OK” and the selected graphs will appear on one page

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- From the multiple graphs view you can select a date range.



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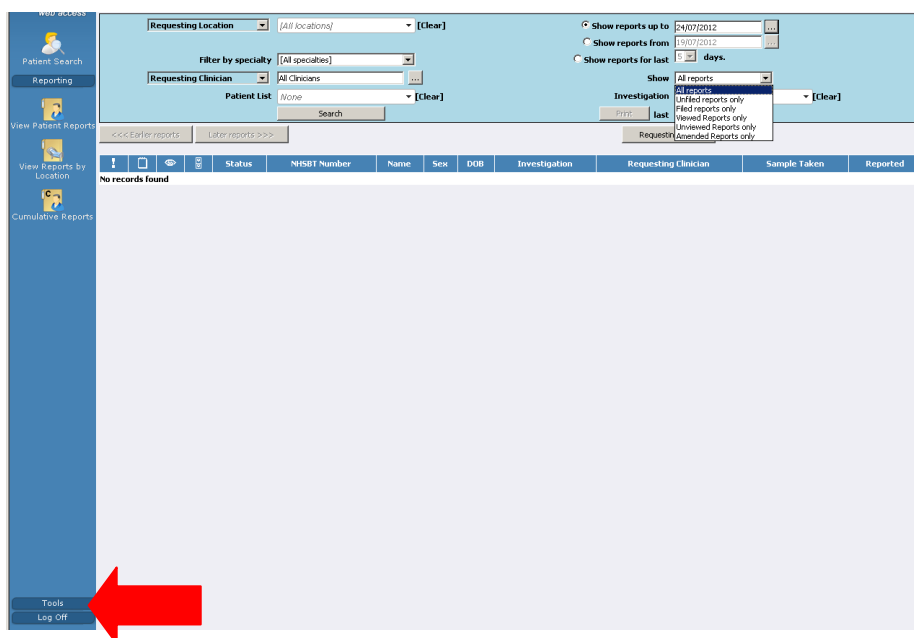
Amended/Updated Reports

If a report is amended, the original PDF report will be replaced by an amended PDF report and the “Viewed Status” icon will change to - . Reports may simply be amended (i.e. overwritten) because they have been reprinted within NHSBT even though the actual report has not changed. If a report has been changed, the updated PDF report will state “amended report”. NHSBT will contact by telephone the Lab Manager/deputy from the referring location.

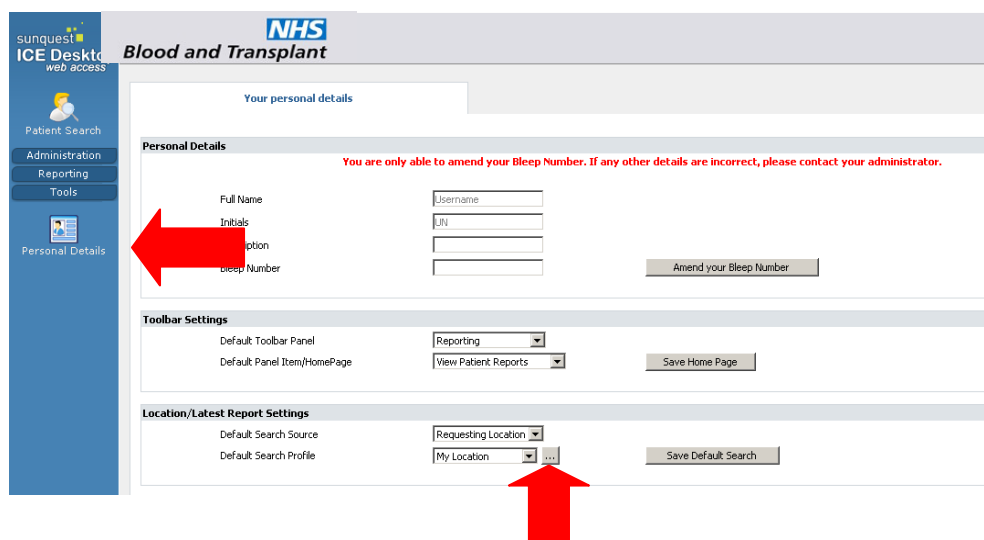
4.3 Search Options

It is possible to set up a customised profile that includes hospitals that you would regularly view results for other than your log in location. You can set this profile as your default search locations.


- Select “Tools” from the tool bar.

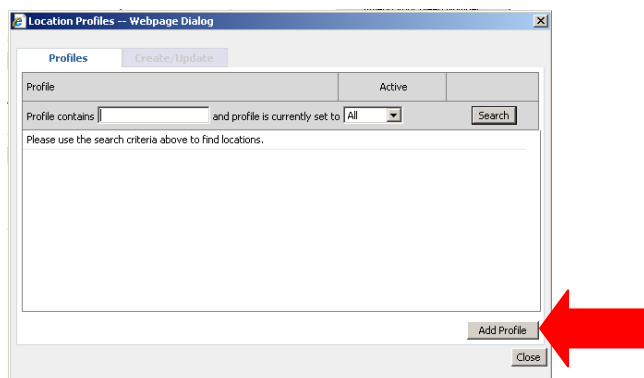


- Select “Personal Details”

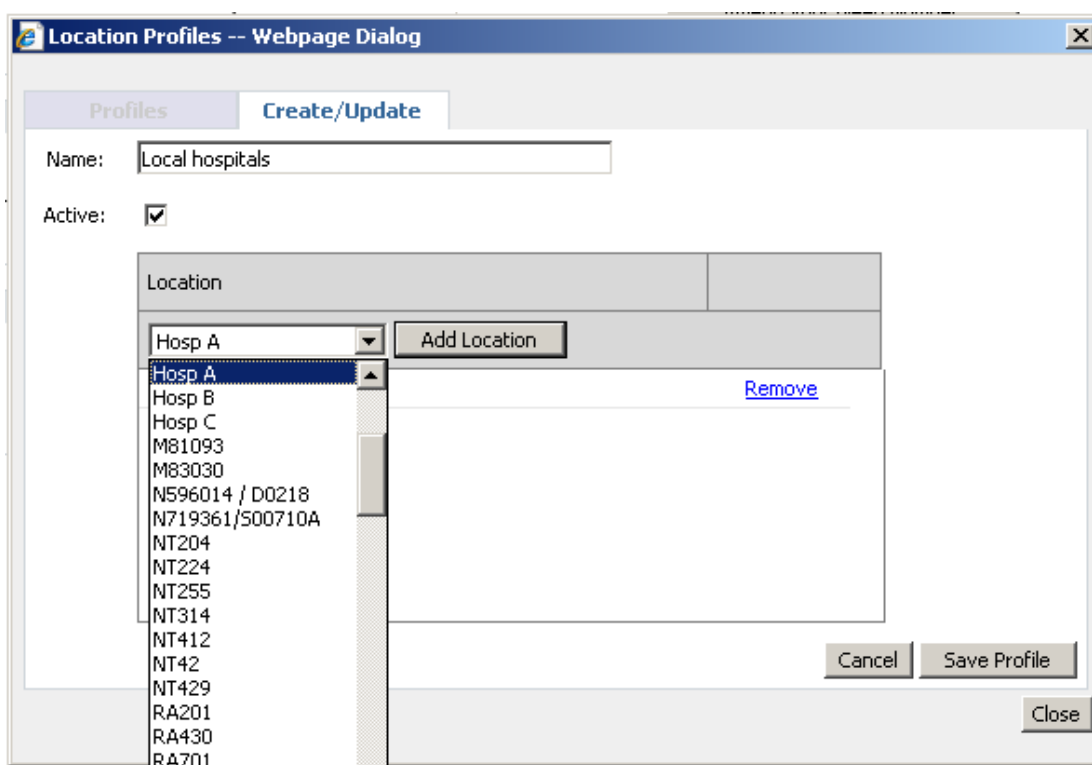


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- Open the webpage dialogue box next to the “Default Search Profile” (i.e. click )
- Select “Add Profile”.



- Type in name of profile. Select location from drop down list and select “Add Location”, repeat for each location required.
- Select “Save Profile”. Close Webpage dialogue box.



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- Select required “Default Search Profile” from the drop down list and select “Save Default Search”.
- Administrators can change the “Default Toolbar Panel” from “Administration” to “Reporting”. Selecting anything other than “Reporting” or “Administration” from the drop down list will have no impact.

- Log out of Sp-ICE and log back in to check that the default settings have been updated.

The **View Latest Reports** and **View reports by location** screens have various search options see screenshot below.

Note: Once search criteria are selected for “View Latest Reports” or “View Reports by Location”, these same parameters are applied when toggling between these screens.

Enter the required search criteria based on the information in the table below and then click **Search**. Please note the search parameters do not update unless you click **Search**.

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| | |
|---|--|
| Location (1) | Leave as "Requesting Location" |
| Location (2) | Defaults to users log in location or profile set by user. Select "[Clear]" to obtain "[All locations]" followed by "Search", a drop down list is then available from which to select an alternative location, once selected click on "Search". |
| Filter by Speciality | Select speciality from drop down list. |
| Clinician (3) | Leave as "Requesting Clinician" |
| Clinician (4) | Leave as "All Clinicians" or open web page dialogue box and search for clinician |
| Patient List | Leave as "None" |
| Show reports up to | Select the radio button and enter the date up to which you wish to display any available reports (this is the default option and is automatically set to the current date) |
| Show reports from | Select the radio button and enter the date from which you wish to display any available reports |
| Show reports for last x days | Select the radio button and select the number of days from the drop down list for which to view previous reports |
| Show (only on Review reports by location screen) | Select option from drop down list: <ul style="list-style-type: none"> • All reports – displays filed, unfiled and amended reports • Unfiled reports only • Filed reports only • Viewed reports only • Unviewed reports only • Amended Reports only |
| Investigations (5) | Use to filter for H&I results enter 'H' |
| Print last x reports | Do not print from this option it does not print the full PDF report |

Filter by Investigation

- Select 'View Reports by Location' or 'View Latest Reports'
- Click into the Investigation box and type 'H' (5)
- All investigations that include the letter H will be listed in the drop down
- Select the desired Investigation and click 'Search'
- H+I Disease Association will display just the HLA B27 results
- H+I Report will display **ALL** H&I reports

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The screenshot displays the NHSBT Specialist Services Electronic Reporting System (SP-ICE) interface. The top section contains search filters: 'Requesting Location' (set to 'All locations'), 'Filter by specialty' (set to 'All specialties'), 'Requesting Clinician' (set to 'All Clinicians'), and 'Patient List' (set to 'None'). There are also date range filters: 'Show reports up to' (04/01/2013), 'Show reports from' (30/12/2012), and 'Show reports for last' (5 days). A dropdown menu for 'Investigation' is open, showing options like 'H+I Disease Association', 'H+I Report', and 'ABO/RHD group'. Red arrows point to the 'Show' button and the 'Clear' button next to the 'Investigation' dropdown.

Please note: If you wish to change your search parameters after using the Investigation field you MUST click (Clear)

Filter by Speciality

- Select 'View Reports by Location' or 'View Latest Reports Click 'Filter by speciality' drop down.
- Select the desired Speciality and click 'Search'.

| Department | Speciality | Report Dates |
|-----------------------------|---|--|
| RCI | All RCI referrals | Nov 9 th 2011 – 27 th Nov 2013 |
| | All RCI referrals (latest report only) not available until May 2014 (Excluding routine antenatals and antibody cards) | 31 st Oct 2006 – 8 th Nov 2011 |
| | RCI reference | From 27 th Nov 2013 |
| | RCI antenatal | From 27 th Nov 2013 |
| | Transplant titration | From 27 th Nov 2013 |
| RCI/IBGRL | RCI reference or antenatal with linked IBGRL genotype report. | From 27 th Nov 2013 |
| IBGRL Molecular Diagnostics | IBGRL, all fetal blood group genotyping from maternal plasma, full genotyping (for common blood group antigens), Rh genotyping, paternal <i>RHD</i> zygosity testing and fetal sex typing | From 27 th Nov 2013 |
| RCI/IBGRL | RCI reference or antenatal with linked IBGRL red cell report | From 8 th May 2014 |
| H&I | H&I xxxx – a range of specialities designed to logically group referrals received by NHSBT | From 28 th Nov 2012 |

- If the expected report is not displayed against a specific H&I speciality use the Filter by Investigation search process.

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4.4 Viewing Reports

Viewing Reports by Location

- Select the “View Reports by Location” icon. Reports from the users default location are displayed unless they have set their own profile. To change the default location select clear, select new location code from drop down list, select search. The process to view a report is identical to that previously described in “View Patient Reports”.

Viewing Latest Reports

The main benefit of using “View Latest Reports” is that it can be used as a tool to view the most recent reports for a specific location as they are received. All new reports will be available through this view until the report is “filed”. Once a report is filed, it is automatically removed from the “View Latest Reports”.

PLEASE BE AWARE – If a report is filed it will no longer be viewable through “View Latest Reports”.

Select the “View Latest Reports” icon. Ensure the correct location code is selected from the drop down list. The list of reports for the selected location is displayed. Patients reports are accessed as previously described.

4.5 Filing a Report

Users accounts can be set up with or without access to filing reports for their log in location/s. For those with access to filing:

- Ensure you either initially log in to the location you wish to file for or change locations using the change location option by hovering over the current hospital location (Hosp A in the example below).

PLEASE BE AWARE – At present if you have more than one log in location you can file reports for any of your log in locations irrespective of the log in location you have selected.

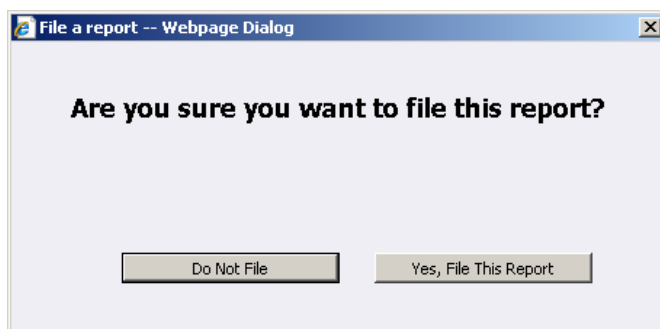
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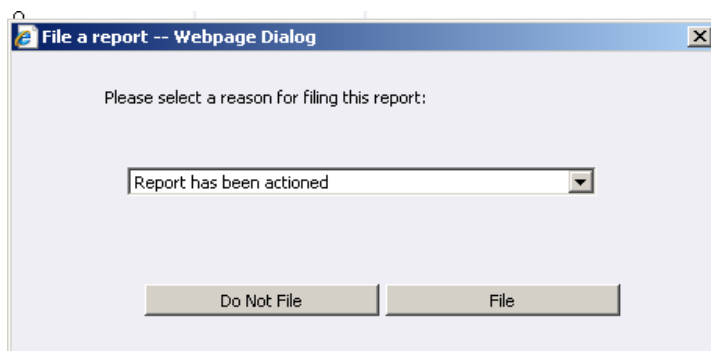
- Access “View Latest Reports”.
- Select the patient report to view
- Select the **File** button



- The following message is displayed:



- If you select **Do Not File**, you will be returned to the report. If you select **Yes, File This Report** the following dialog box is displayed:



- Select the correct reason for filing the report and select file.

Un-filing a Report

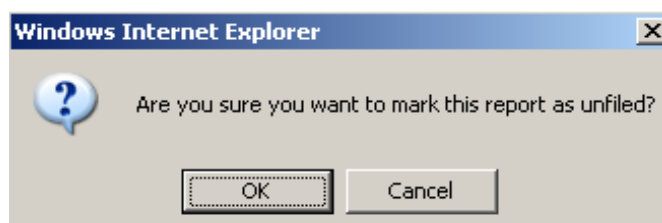
- Select **View Reports by Location** from the tool bar
- Select the location for which you wish to display reports and ensure that the **Show** is set to “**All reports**”.
- Select “Search” to display available reports. Both filed and unfiled reports for that location will be displayed. A report that has been filed will be marked by the filer’s initials in the

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fourth column. Information relating to who filed the report and the reason for filing can be seen if you hover over the initials.

- Select the filed report and then select “Unfile”

- Select OK for “Are you sure you want to mark this report as unfiled?”




- Report is again available through the “View Latest Reports”.

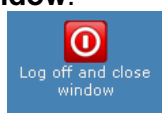
4.6 Audit Trail

There is a full audit trail of report access.

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4.7 Closing Sp-ICE

- To exit the application select the **Log off** button  (located at the bottom of the left hand tool bar).
- The user can then exit the application completely by clicking on **Log off and close window**.



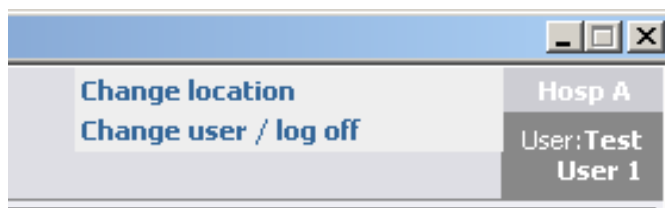
- The user can also exit the application but leave it running for someone else to log on by clicking the **Change User** button.



OR

- Selecting “Change user/log off” in the top right hand corner after hovering over the hospital location (Hosp A in the example below)

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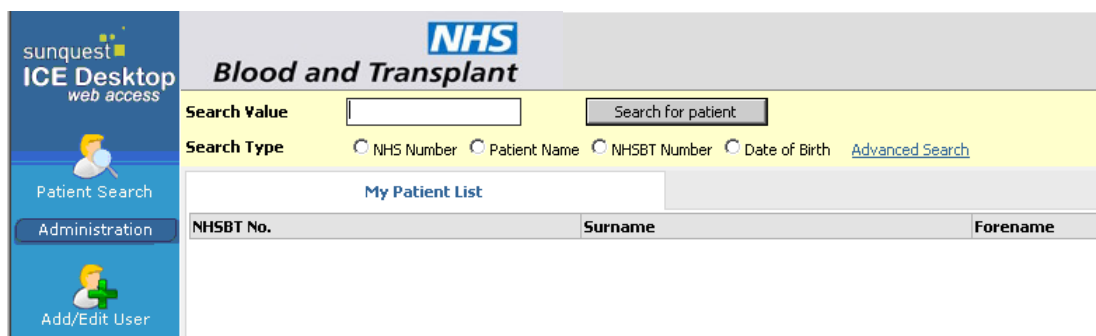


This will log the user off but display the login screen for the next user

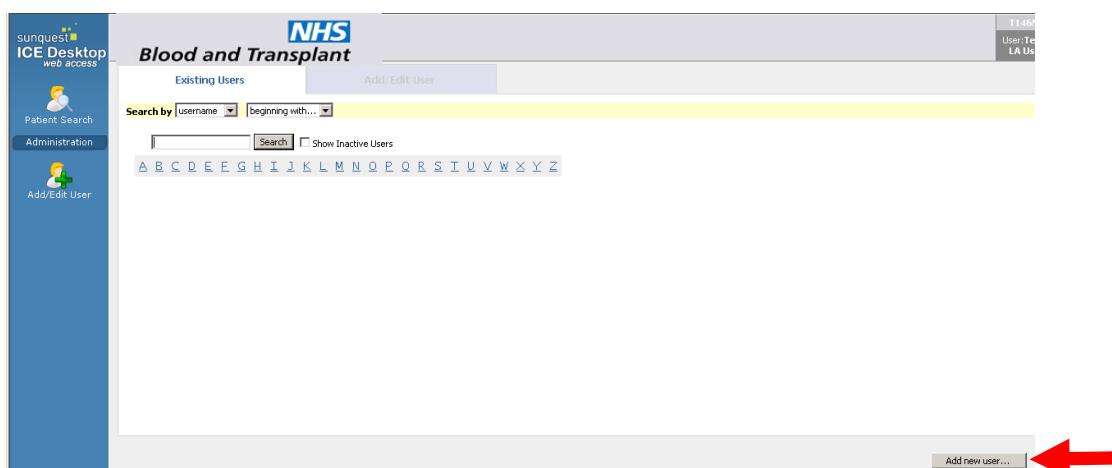
5 Local Hospital System Administration

5.1 Add a new Sp-ICE user account

- Log into Sp-ICE using your local administrator account
- Click “Add/Edit user” from the tool bar in the “Administration” tab.



- A screen is displayed where you can either add a new user or search for existing users.
- Click “Add new user...” button at the right of the screen



- **User name** – Enter a user name. A warning will be displayed when you save the user if the username has already been used (possibly by a different organisation).
- **Password** – Enter a password for the user (minimum eight characters including at least one number).

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- **Confirm password** – Re-enter the same password for the user.
- **Change password at next login** – You must tick to force the user to change their password when they login for the first time.
- **Password never expires** – this is greyed out and cannot be changed.
- **User Account is locked** – This will be ticked if the user has locked their account by entering their password incorrectly 5 times.
- **User is Inactive** – Tick to inactivate a user account.
- **User role** – Select a suitable role for the user from the drop down list. See Appendix 1 for details of roles.
- **Full name** – Enter the users Forename followed by Surname:
 - This information is displayed when a user has viewed a report.
- **Initials** – Enter the users' initials.
- **Description** – Enter your Hematos location code.
- **Bleep number** – Leave blank.
- **Email address** – Enter a valid email address for the user:
 - Sp-ICE will display a message if an invalid format is entered.
 - If no email address is entered the user will be unable to receive a new password via the "Forgotten Password" option. This would then require the user to contact the local administrator to reset their account.
- **Language** – Defaults to English.
- **Start date** – Enter an active from date for the account. This can be left blank.
- **End date** – Enter an expiry date for the account. This can be left blank.

- **User Options** – This is configured at role level by NHSBT, nothing can be changed.
- **Toolbar Options** – This is configured at role level by NHSBT, nothing can be changed.
- **Expand Locations Profile:**
 - **Allow user to use workstation's default location** – leave un-ticked.
 - **Organisation** – Leave as "NHS Blood and Transplant".
 - **Subsidiary** – Leave as "[Organisation Locations]".

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- **All Locations** – From the left hand column select the location code to which the user belongs and click “Add selected”. This adds that location to the “User Profile”. Some users may have more than one location allocated.
- A user **MUST** have at least one location code within their “User Profile”.
- If a user has a role that enables them to file reports they will be able to do so for any locations added to the “User Profile” section, when logged into that location.
- To remove a location from “User Profile” select the location and click “Remove selected” button.
- Click “Save User” button to save the user account details.
- The screen returns to “Add/Edit User”.

Please note if any details entered are incorrect an error message will appear in red, make corrections and click “Save User” button.

- Confirm the username to the user and advise them to use the forgotten password option.

5.2 Edit an existing Sp-ICE user account

- Log into Sp-ICE using your local administrator account
- Click “Add/Edit user” from the tool bar.
- Search for the user by Username or Full name. NB tick “Show Inactive Users.”
- Click on the username you require to edit

The screenshot shows the NHS Blood and Transplant Sp-ICE user management interface. At the top, there is a navigation bar with 'Existing Users' and 'Add/Edit User' tabs. Below the navigation bar, there is a search section with a dropdown menu for 'Search by' (set to 'username') and a search button. A table of users is displayed below the search section. The table has columns for Username, Full Name, Description, and Status. The users listed are Test Hospital Admin, Test Hospital User, Test LA User, Test Merge User, Test User 1, Test User 2, and Test User 3. The status for all users is 'Active'.

| Username | Full Name | Description | Status |
|---------------------|---------------------|-------------------------------------|--------|
| Test Hospital Admin | Test Hospital Admin | Test Hospital Admin (DE - 16/07/12) | Active |
| Test Hospital User | Test Hospital User | Test Hospital User (DE - 16/07/12) | Active |
| Test LA User | Test LA User | Acceptance Testing Local Admin User | Active |
| Test Merge User | Test Merge User | Acceptance Testing Merge User | Active |
| Test User 1 | Test User 1 | Acceptance Testing User 1 | Active |
| Test User 2 | Test User 2 | Acceptance Testing User 2 | Active |
| Test User 3 | Test User 3 | Acceptance Testing Search User 3 | Active |

- Make the required changes to the user details and click “Save User” button.

5.3 Unlocking a user account

If a user has locked their account by incorrectly entering their password 5 times then they will receive a message to contact their local administrator.

- Log into Sp-ICE using your local administrator account
- Click “Add/Edit user” from the “Administration” tool bar.
- Search for the user by Username or Full name (minimal details can be entered and name selected from resulting list). NB tick “Show Inactive Users.”
- Click on the username you require to edit.
- Un-tick the “User Account is Locked” box, the Change Password at next login box is automatically ticked.
- Click “Save Changes” button.
- Contact the user and instruct them to use the “Forgotten Password” option which will send them a new password via email (if their account has their correct email address).

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5.4 Inactivating a user account

If there is a requirement to inactivate a user account; e.g. because they have left the organisation or have breached data protection guidelines then it is the responsibility of the local administrator to set that account to inactive.

- Log into Sp-ICE using your local administrator account.
- Click “Add/Edit user” from the “Administration” tool bar.
- Search for the user by Username or by Full name (minimal details can be entered and name selected from resulting list).
- Click on the username you require to edit.
- Tick the “User is Inactive” box.
- Click “Save Changes” button.

5.5 Re-activating a user account

An account that was set to inactive can be re-activated if required.

- Log into Sp-ICE using your local administrator account.
- Click “Add/Edit user” from the “Administration” tool bar.
- Search for the user by Username or by Full name ensuring the “Show Inactive Users” box is ticked (minimal details can be entered and name selected from resulting list).

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| Username | Full Name | Description | Status |
|---------------------|---------------------|-------------------------------------|----------|
| Test Hospital Admin | Test Hospital Admin | Test Hospital Admin (DE - 16/07/12) | Active |
| Test Hospital User | Test Hospital User | Test Hospital User (DE - 16/07/12) | Active |
| Test LA User | Test LA User | Acceptance Testing Local Admin User | Active |
| Test Merge User | Test Merge User | Acceptance Testing Merge User | Active |
| Test Search User | Test Search User | Acceptance Testing Search User | Inactive |
| Test User 1 | Test User 1 | Acceptance Testing User 1 | Active |
| Test User 2 | Test User 2 | Acceptance Testing User 2 | Active |
| Test User 3 | Test User 3 | Acceptance Testing Search User 3 | Active |
| TEST01 | RCI TEST | | Inactive |
| Test1 | Test Password | | Inactive |

- Click on the username you require to edit, as the account is inactive it will be highlighted in red.
- Un-tick the “User is Inactive” box.
- Click “Save Changes” button.

6. Adding and Editing an Announcement (NHSBT only)

- Select “Tools”.
- Select “System News”.
- Select “Add news or message”.

| News title | Start date | End date | Allow login | Status |
|---------------|------------------|------------------|-------------|----------|
| Announcements | 13/12/2011 00:00 | 18/07/2012 00:00 | Yes | Inactive |
| TEST SYSTEM | 21/10/2011 00:00 | 30/11/2011 00:00 | Yes | Inactive |

- Add Title.
- Select start and end dates.
- Add message (Please note there is no spell check but text can be composed in Word, checked then copy and pasted).
- Select “Update system news item”.
- Announcements are displayed on the login page.

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The screenshot shows the 'Edit / Add Message' interface. The title is 'Announcements'. The start date is '12/09/2012 13:00' and the end date is '12/09/2012 14:00'. The message text area contains the text: 'Any announcements will be displayed on the log in page.' Below the message area, there are checkboxes for 'Allow users to login during this period?' and 'Make this news item active'. A red note at the bottom states: 'Note : Please note that the news is refreshed every 5 minutes for performance reasons, if you are updating a current message it will only appear within 5 minutes time.' A red arrow points to the 'Update system news item' button.

- To edit an announcement select the relevant announcement from the list.
- Edit as appropriate including removing from news and messages.
- Select "Update system news item".

The screenshot shows the 'News and Messages' screen. It displays a table of news items. The table has the following columns: News title, Start date, End date, Allow login, and Status.

| News title | Start date | End date | Allow login | Status |
|-------------------------------|------------------|------------------|-------------|--------------|
| Hospitals and Science Website | 13/09/2012 10:00 | 13/09/2012 19:00 | Yes | Current News |
| Hospitals and Science Website | 13/09/2012 10:00 | 13/09/2012 19:00 | Yes | Inactive |
| Announcements | 12/09/2012 13:00 | 12/09/2012 14:00 | Yes | Passed |
| Announcements | 13/12/2011 00:00 | 18/07/2012 00:00 | Yes | Inactive |
| TEST SYSTEM | 21/10/2011 00:00 | 30/11/2011 00:00 | Yes | Inactive |

7. Support Arrangements

NHSBT provide support from 08:00 to 17:00 Monday to Friday, excluding public holidays. Contact details are as follows:

- Telephone –01138208777
- Email – service.desk@nhsbt.nhs.uk

Users must not contact the software supplier directly concerning any issues.

NHSBT will notify in advance of all planned system down time and a message will be displayed on the logon screen.

- For non-urgent results if there is an interruption to the Sp-ICE, service please try logging in one hour later.
- In the unlikely event of long interruptions to the Sp-ICE service NHSBT will inform hospitals of contingency arrangements via normal contingency planning communication routes.

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- For urgent results, telephone your local RCI department.

8. System performance and adverse event / incident reporting

- If you experience any system performance issues please contact your local IT to ensure there are no local issues impacting your network.
- It is essential that any software issues or unexpected error messages are reported (contact details in 7 above) at the earliest opportunity. The priority/urgency of the call should be made clear. Please note errors in patient data must be reported to your local RCI laboratory.
- Any sustained performance issues and unresolved adverse events / incidents should be discussed with an NHSBT Customer Services Manager. A customer complaints / comments form is available from the Customer Services Manager for written notifications.

9. Software development and new versions

Software development and installation will follow the life cycle described in the International Society of Pharmaceutical Engineering's Good Automated Manufacturing Practice (GAMP) guidance <http://www.ispe.org/gamp-5>

Software changes may result from a Request for Change (RFCs) which should for non-NHSBT staff be discussed with the NHSBT Customer Services Manager.

Routine software upgrades will be evaluated by NHSBT for their benefits, validated and implemented in accordance with an NHSBT release cycle. Essential "bug" fixes will take priority.

All NHS users will be kept up to date with planned developments through the monthly Update and the NHSBT website.

10. System back up and archiving arrangements

Sp-ICE is refreshed with new report data on an hourly basis and the entire system is backed-up on a daily basis. It can be fully restored using this back-up. In the event of needing to restore the database, more recent data would be reloaded.

When implemented, the previous 9 months of report data for RCI will be migrated onto Sp-ICE. Limited H&I historical data will be migrated pre implementation. There is currently no intention to archive and remove data from Sp-ICE although system performance will be monitored closely and this may be necessary at some point in the future. It is NHSBT's intention to manage retention of data in compliance with the NHS Records Management Code of Practice.

Historical reports not uploaded to Sp-ICE will remain available through the Hematos SpS system and can be obtained by arrangement with the appropriate NHSBT Reference Laboratory Manager.

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11. Sp-ICE related documentation

- [FRM4116](#) – Information for Healthcare Organisations wishing to access NHSBT Diagnostic Results via Sp-ICE
- [FRM4117](#) – Sp-ICE Hospital Administrator User Access Request
- [FRM4101](#) – Sp-ICE NHSBT User Access Request

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Appendix 1 - Sp-ICE User Roles

| Role | Description | Permissions |
|----------------------|---|--|
| RCI-HFU | Hospital user who can view and file RCI reports | <ul style="list-style-type: none"> • Can access RCI results • Cannot access H&I results • Can file RCI reports for their logged in location |
| RCI-HU | Hospital user who can only view RCI reports | <ul style="list-style-type: none"> • Can access RCI results • Cannot access H&I results • Cannot file reports for their logged in location |
| H&I-HFU | Hospital user who can view and file H&I reports | <ul style="list-style-type: none"> • Can access H&I results • Cannot access RCI results • Can file H&I reports for their logged in location |
| H&I-HU | Hospital user who can only view H&I reports | <ul style="list-style-type: none"> • Can access H&I results • Cannot access RCI results • Cannot file reports for their logged in location |
| RCI/H&I-HFU | Hospital user who can view and file RCI and H&I reports | <ul style="list-style-type: none"> • Can access RCI and H&I results • Can file RCI and H&I reports for their logged in location |
| RCI/H&I-HU | Hospital user who can only view RCI and H&I reports | <ul style="list-style-type: none"> • Can access RCI and H&I results • Cannot file reports for their logged in location |
| RCI-LHA ¹ | Hospital administrator who can add RCI users, view and file RCI reports | <ul style="list-style-type: none"> • Can add/edit RCI users • Can access RCI results • Cannot access H&I results • Can file RCI reports for their logged in location |

¹ These roles will only be available for selection by NHSBT system administrators

Continued

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Sp-ICE User Roles Continued

| | | |
|--------------------------|---|--|
| H&I-LHA ¹ | Hospital administrator who can add H&I users, view and file H&I reports | <ul style="list-style-type: none"> • Can add/edit H&I users • Can access H&I results • Cannot access RCI results • Can file H&I reports for their logged in location |
| RCI/H&I-LHA ¹ | Hospital administrator who can add RCI and H&I users, view and file RCI and H&I reports | <ul style="list-style-type: none"> • Can add/edit RCI and H&I users • Can access RCI and H&I results • Can file RCI and H&I reports for their logged in location |
| RCI-LHA-NF ¹ | Hospital administrator who can add RCI users, view RCI reports but not file any reports | <ul style="list-style-type: none"> • Can add/edit RCI users • Can access RCI results • Cannot file RCI reports for their logged in location |
| NHSBT-SM ¹ | NHSBT system manager | <ul style="list-style-type: none"> • Full system configuration access • Can access all results • Cannot file any results |
| NHSBT-SA ¹ | NHSBT system administrator | <ul style="list-style-type: none"> • Limited system configuration access • Can access all results • Cannot file any results |
| NHSBT-U ¹ | NHSBT user | <ul style="list-style-type: none"> • Can access all results • Cannot file any results |

¹ These roles will only be available for selection by NHSBT system administrators

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Appendix 2 - System management

Sp-ICE is managed by the NHSBT Specialist Services (SpS) IT Systems Manager supported by:

- The SpS Systems Assurance Manager
- SpS Implementation and Development Co-ordinators (IDCs)
- SpS Operation Team (SpSOT) represented by senior practitioners from Red Cell Immunohaematology (RCI) and Histocompatibility and Immunogenetics (H&I)
- NHSBT Service Desk

The SpS IT Systems Manager liaises with:

- NHSBT Systems and Securities Manager to assure the security of NHSBT confidential patient data
- NHSBT IT/Technical Services concerning system performance, integrity and development
- National Acceptance Manager concerning the testing of new software releases
- Configuration Control and Release Manager concerning new software releases
- NHSBT Customer Services concerning performance issues and external user perspectives

Sunquest concerning system performance, integrity and development